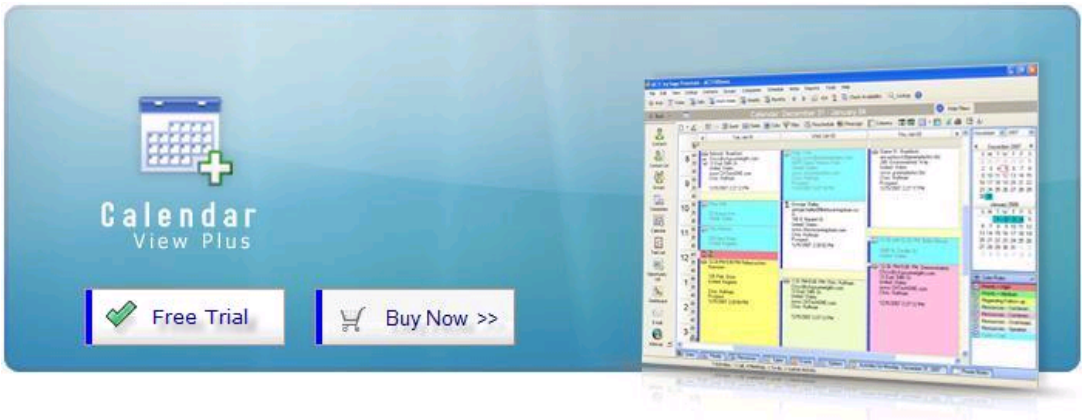

Durkin Opportunity List Plus for ACT!

User Manual

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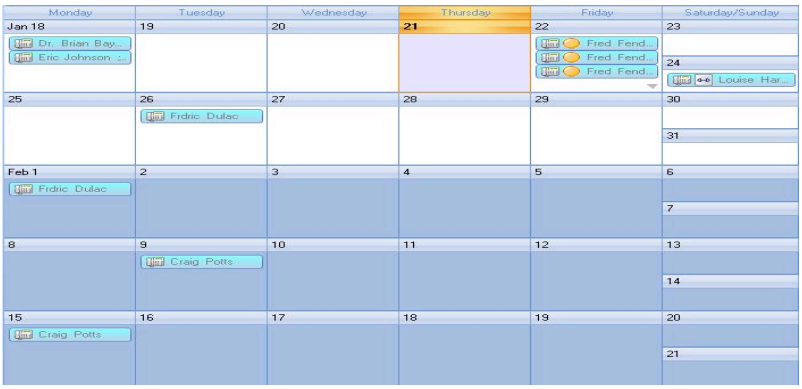

Created: Monday, March 08, 2010

Durkin Calendar Plus for ACT!

by Jim Durkin
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Many thanks to the ACT! Development Team.

Many Many thanks to all the beta testers!

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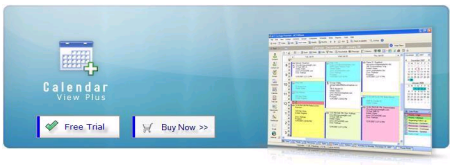
DurkinOpportunity Online Manual



Welcome to the Durkin Opportunity List Plus for ACT! online help system. Browse through the help pages by clicking on the icons below or selecting pages in the table of contents to the left. To quickly find specific product information, enter search criteria in the search box above and click the search button.

PDF Version
Welcome
Installation
Options
Toolbar
Queries
Right Click Menu
Color - Rules
Invoice Number Generation
Documents

Ask Us

If you're unable to find what you're looking for in this help system, try these alternative resources:

- DurkinComputing.com
- Community

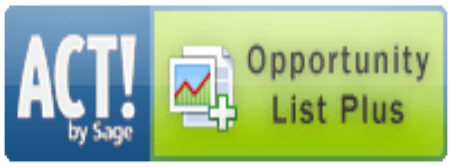
or contact our support team:
support@DurkinComputing.com

Most popular pages

- Help Home
- Welcome
- Installation
- Ask Questions!
- System Requirements
- Installing from Internet
- What is a PDF Manual?
- Enter the Activation Key
- How To Order
- Upgrades

Page: http://www.durkincomputing.com/HelpConsole2008/DurkinToolkit/manual.pdf could not be added

DurkinOpportunity Online Help



Durkin Opportunity List Plus for ACT! adds the power to manage and generate; quotes, projects, events, job sheets and proposals. Offering a familiar, easy-to-use interface, delivering robust features.

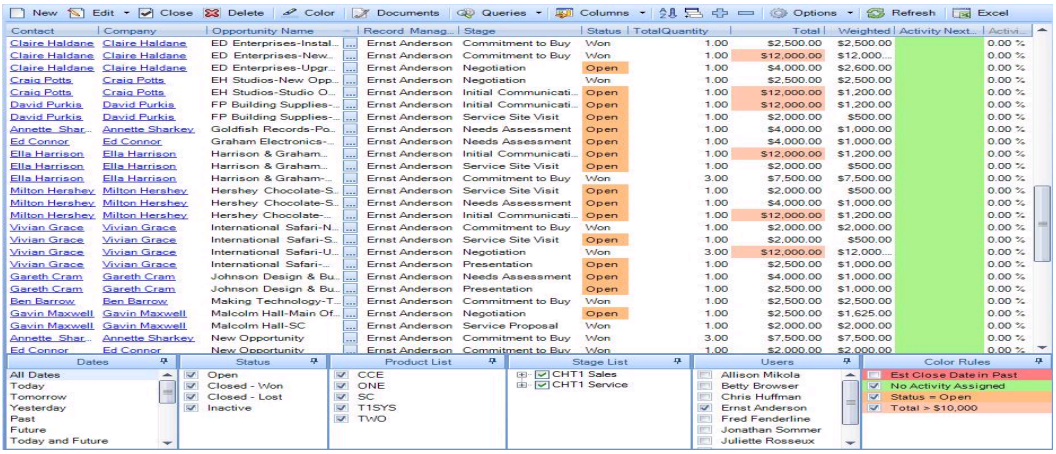
Durkin Opportunity List Plus for ACT! is embedded inside ACT!'s easy-to-use interface, so there's no need to run multiple applications or launch external programs. Once installed you will wonder how you got along without it. This opportunity management addon for ACT! is a must have for any power user.

Easy To Use ACT! Addons

• Advanced List Management Opportunity List Plus adds a variety of powerful features to ACT's native opportunity list to help you efficiently manage your opportunities. When you install Opportunity List Plus you'll immediately experience a more detailed list that uses powerful list management tools accessible on our toolbar.
• Appearance and Colorization: You can define color conditions that are applied to all of your opportunities at all times. Display all "Customers" as green or State="New York" as Blue. You can quickly design your own color rules. These color rules can be easily turned on/off with a click off the mouse.
• Auto-number generator: Allows for multiple auto-number sequencing to be selected when entering a new opportunity, quotes and/or invoices. You can seed these numbers with any alpha numeric combination. These sequential numbers are stored in the ACT! database folder so users will always be in sync.• Reschedule or reassign any activities in a single click or by simple dragging it onto another date.
• Expanded Product and Contact Information. The list support expandable rows that display products and/or services attached to an opportunity. Viewing this data on screen is not possible in ACT! And can only be obtained by running a complex report. We also expand the columns to all fields from the contact table. You can include any column like ID/Status or postal code on the list.
• New filter selectors: Filter opportunities on the screen by product name or product number (SKU #) fields. For more on filtering please see the Sorting, Grouping and Filtering below.
• Multiple Templates: By default, ACT! only has one 'quote' template but with our add-on you can design multiple templates for multiple purposes and and give them names such as; "Quotes", Invoice US", "invoice UK" and "Project Status".• Add colors based on text such as 'send RFP,' 'follow-up,' 'whitening,' 'oil change,' 'take X-ray,' etc.
• Template to PDF to Email: Templates can be quickly generated, automatically converted to a PDF, and then attached directly to an email ready to send. All you need to do is fill in the email body or use our email template to do that for you!

Tighter Data Coupling with SQL

• Data mining: You can define simple or complex conditions that can be used to filter, format, group, tabulate or find rows which conform to any criteria. All these features together help you analyze data from different perspectives and summarize it into useful information - information that can be used to increase revenue, cut costs, or both.
• Deeper data integration: All of our add-ons have deeper data integration then the native ACT! list. For example: we display the actual notes text rather than a simple icon; all the contact names are listed on an appointment rather than "<Multiple Contacts>" and we can display more than 10 users at one time on the Task List and Calendar View (a limitation in the current ACT! 10 product).
• Expandable Data: Most Durkin add-ons lists support expandable rows to display secondary information like any contact fields when viewing the task list or product names when viewing an opportunity. Viewing this data on screen is not possible in ACT! And can only be obtained by running a complex report. Our lists not only display this information but also print, export, subtotal, format and sort it.



See also

Help Home
PDF Version
Installation
Options
Toolbar
Queries
Right Click Menu
Color - Rules
Invoice Number Generation
Documents

Get help from Customer Support or other resources

Ask Someone

Post a question or search for an answer in our online community forum .

FAQs and Knowledgebase

Search the FAQs or the Knowledgebase for common questions regarding Durkin Computing add-ons and ACT!.

Customer Support

Contact our customer support department by email at support@DurkinComputing.com

If you're unable to find what you're looking for in this help system, try these alternative resources:

- Community Forum
- Knowledgebase
- FAQ

Contact our support department:
support@DurkinComputing.com

Phone: 1 + (973) 625-1119

How To Order

Durkin Opportunity List Plus for ACT! can be purchased by clicking the link below. After entering your credit card information,
you will receive an activation key by email which can be entered into the evaluation version to register it.

Buy Now >>

Also, review the Suite Comparison Matrix to view the add-ons bundles that can save you over 50%.

Credit cards accepted:

- Visa
- MasterCard
- American Express
- Eurocard

See also

Ask Questions!
What is a PDF Manual?
How to Get Support?
End-User License Agreement

End-User License Agreement

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See also

Ask Questions!
How To Order
What is a PDF Manual?
How to Get Support?

Installation

Refer to the checklist below when installing and configuring Durkin Opportunity List Plus for ACT! on your PC.

Implementation Checklist:

- System Requirements
- Installing from the Internet
- Enter the Activation Key
- Upgrades

Getting Started

System Requirements

Installing from Internet

Enter the Activation Key

Upgrades

See also

Help Home
PDF Version
Welcome
Options
Toolbar
Queries
Right Click Menu
Color - Rules
Invoice Number Generation
Documents

System Requirements

ACT! Software

- ACT Standard or Premium 10.2 or better.
- Windows XP Professional* / Windows 2003 / Windows Vista / Windows 2008
- 256 megs RAM
- Harddrive Space: 50 megs
- Microsoft Word and/or Outlook suggested.

Internet Browser Software

- All browsers supported
  (Required for on-line help)

See also

Installing from Internet
Enter the Activation Key
Upgrades

Installing from Internet

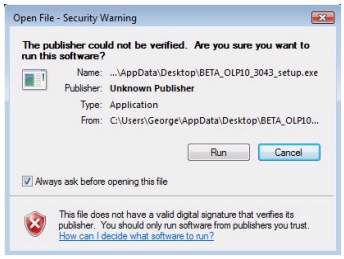
The setup program will install 'Durkin Opportunity List Plus for ACT! ' to a folder that you specify. It is good practise to install to a designated web server. Ensure that your workstation or web server meets the recommended requirements as outlined in System Requirements.

Follow the steps below to install Durkin Opportunity List Plus for ACT! :

1. Download Durkin Opportunity List Plus for ACT! from http://www.durkincomputing.com/Download.aspx, the following message will appear. Click 'Run'.

File Download - Security Warning
Do you want to run or save this file?
Name: BETA_OLP10_3043_setup.exe
Type: Application, 11.2MB
From: durkincomputing.com
Run
Save
Cancel
While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not run or save this software. What's the risk?

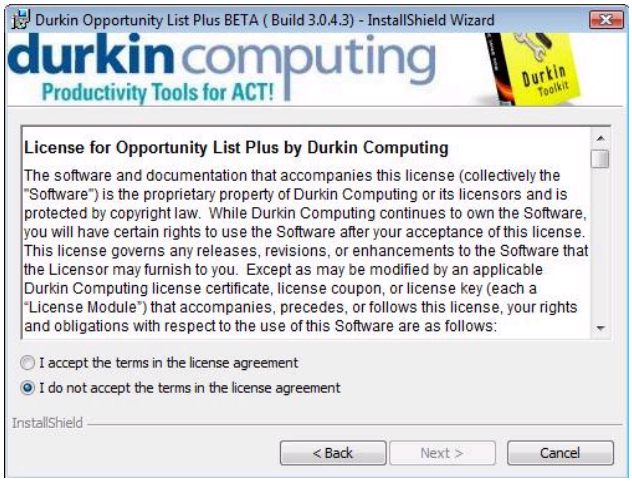
2. A security warning screen may appear. Click 'Run' to continue.


Open File - Security Warning
The publisher could not be verified. Are you sure you want to run this software?
Name: ...\AppData\Desktop\BETA_OLP10_3043_setup.exe
Publisher: Unknown Publisher
Type: Application
From: C:\Users\George\AppData\Desktop\BETA_OLP10...
Run
Cancel
Always ask before opening this file
This file does not have a valid digital signature that verifies its publisher. You should only run software from publishers you trust.
How can I decide what software to run?

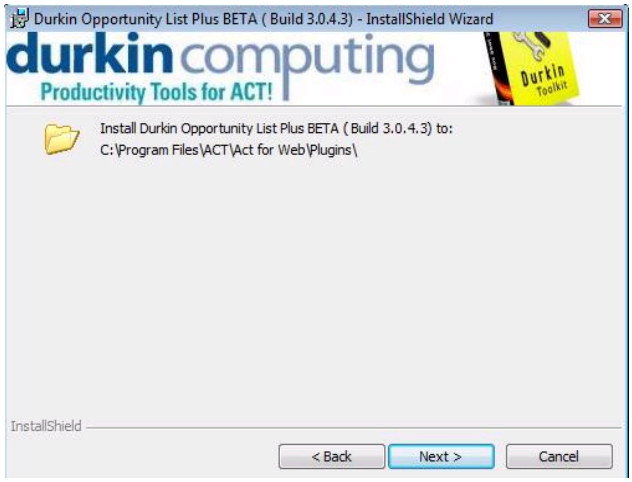
3. Once downloaded, the following 'Welcome' screen will appear. Click 'Next'.

Durkin Opportunity List Plus BETA (Build 3.0.4.3) - InstallShield Wizard
Welcome to the InstallShield Wizard for Durkin Opportunity List Plus BETA (Build 3.0.4.3)
The InstallShield(R) Wizard will install Durkin Opportunity List Plus BETA (Build 3.0.4.3) on your computer. To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
< Back
Next >
Cancel

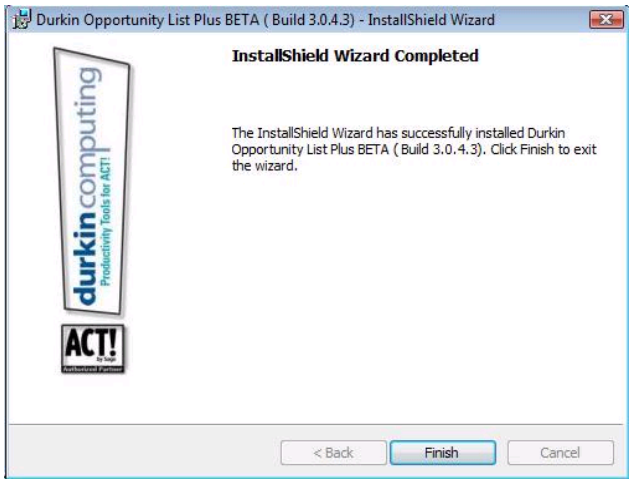
4. You will be asked to accept the license agreement. Check 'I agree' and then click 'next' to continue the installation.


Durkin Opportunity List Plus BETA (Build 3.0.4.3) - InstallShield Wizard
durkin computing
Productivity Tools for ACT!
Durkin Toolkit
License for Opportunity List Plus by Durkin Computing
The software and documentation that accompanies this license (collectively the "Software") is the proprietary property of Durkin Computing or its licensors and is protected by copyright law. While Durkin Computing continues to own the Software, you will have certain rights to use the Software after your acceptance of this license. This license governs any releases, revisions, or enhancements to the Software that the Licensor may furnish to you. Except as may be modified by an applicable Durkin Computing license certificate, license coupon, or license key (each a "License Module") that accompanies, precedes, or follows this license, your rights and obligations with respect to the use of this Software are as follows:
I accept the terms in the license agreement
I do not accept the terms in the license agreement
InstallShield
< Back
Next >
Cancel

5. This window displays the folder location of your current ACT! installation. The default installation folder is "c:\program files\ACT\Act for Windows\Plugins". Click 'Next'.


Durkin Opportunity List Plus BETA (Build 3.0.4.3) - InstallShield Wizard
durkin computing
Productivity Tools for ACT!
Durkin Toolkit
Install Durkin Opportunity List Plus BETA (Build 3.0.4.3) to:
C:\Program Files\ACT\Act for Web\Plugins\
InstallShield
< Back
Next >
Cancel

6. When complete, a message will appear indicating that the installation was successfull. Click 'Finish' to complete the installation.

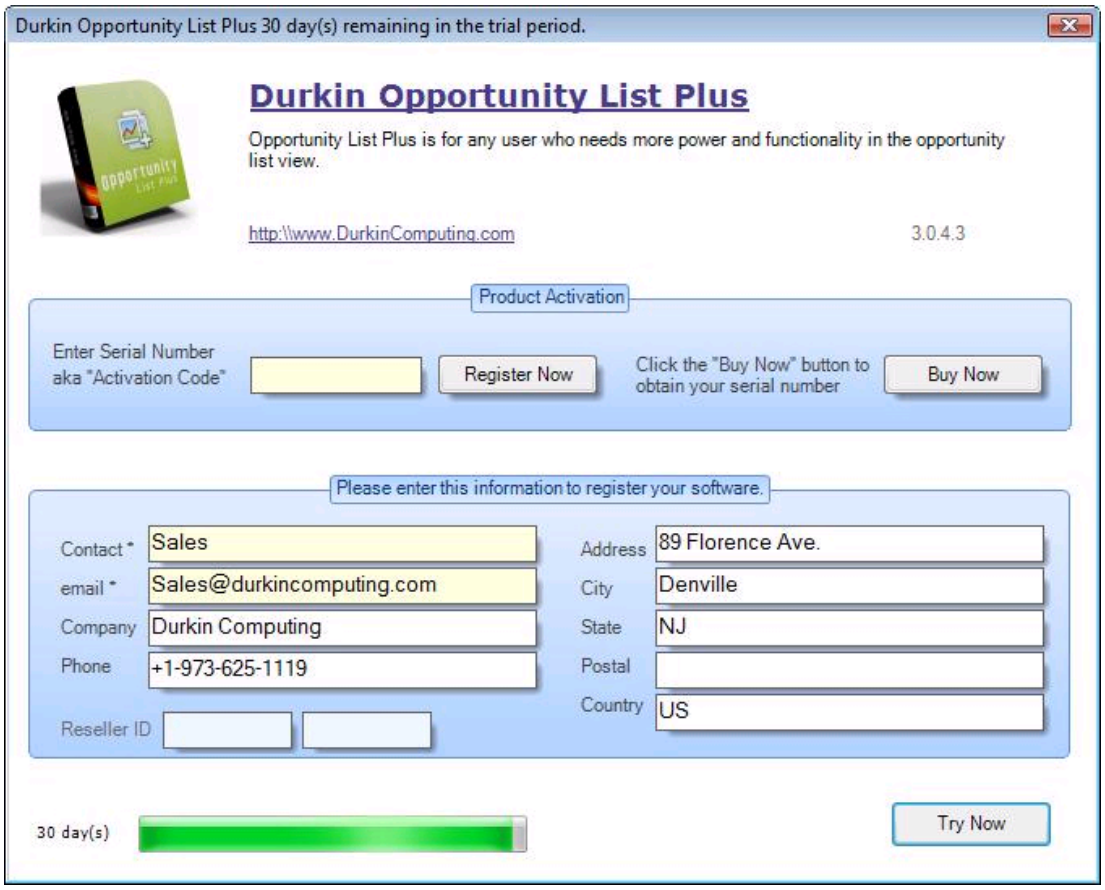

Durkin Opportunity List Plus BETA (Build 3.0.4.3) - InstallShield Wizard
durkin computing
Productivity Tools for ACT!
ACT!
InstallShield Wizard Completed
The InstallShield Wizard has successfully installed Durkin Opportunity List Plus BETA (Build 3.0.4.3). Click Finish to exit the wizard.
< Back
Finish
Cancel

7. Now when you restart ACT! you will be prompted to register your trial version.

If you are registering this trial version then enter;
1) Your "Contact name"

2) Your "Email address"
then click on the REGISTER TRIAL button

If you have already purchased and received a serial number then enter:
1) Your "Contact name"
2) Your "Email address"
3) Your "Serial Number"
then click on the REGISTER NOW button



8. Durkin Opportunity List Plus for ACT! can be accessed by going to the TOOLS menu and selecting DURKIN OPPORTUNITY PLUS.

If the software will be run in a Microsoft Terminal Server or Citrix Server please follow the required steps for each.

See also

System Requirements
Enter the Activation Key
Upgrades

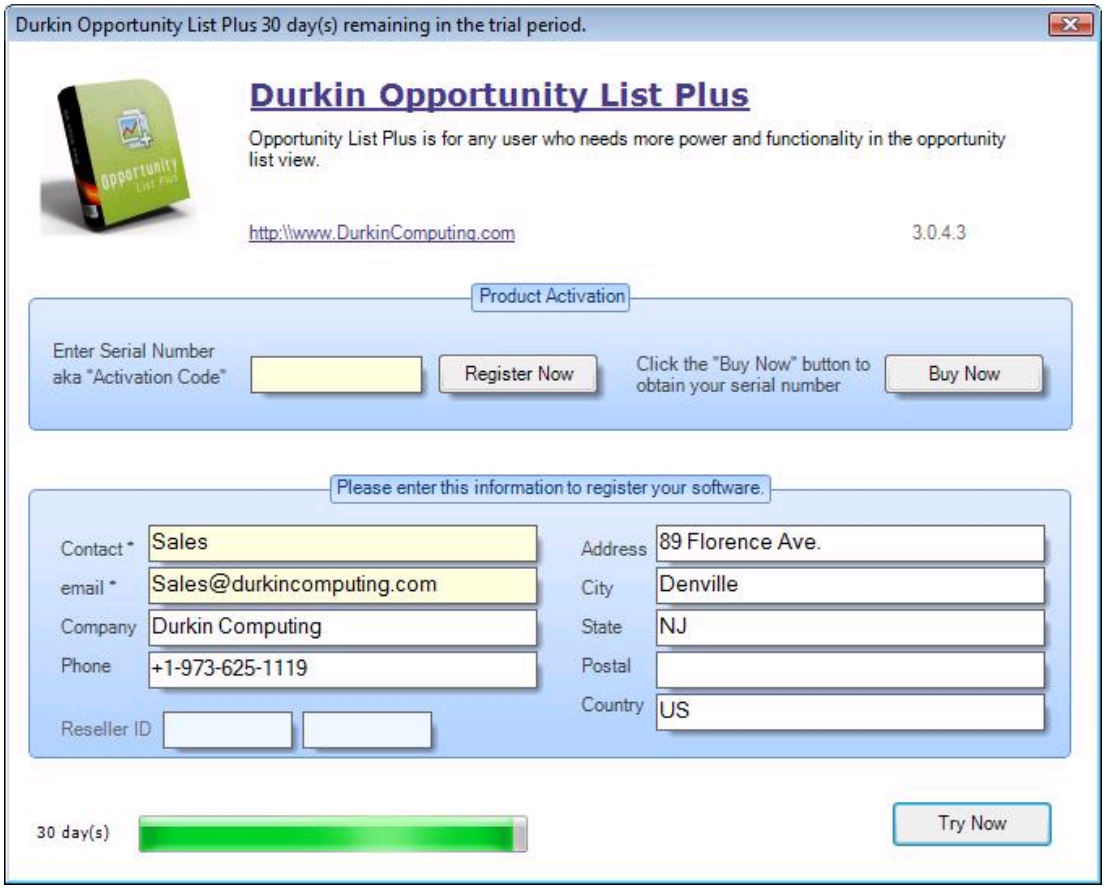
Enter the Activation Key

The first time that Durkin Opportunity List Plus for ACT! is run, you will be prompted to enter an Activation Key or register the trial version. You do not need an Activation Code to trial the software. The activation key is provided when the software is purchased, and when entered, registers the software.

The trial version is the full working software but is limited to a 30 day period. At the end of the 30 days the software will stop working and you will need to purchase an activation code.

Please see How To Order for more information.

If a valid activation key is not entered within 30 days of installing Durkin Opportunity List Plus for ACT! , a message will appear stating that the evaluation has expired and the software will not run.



See also

System Requirements
Installing from Internet
Upgrades

Upgrades

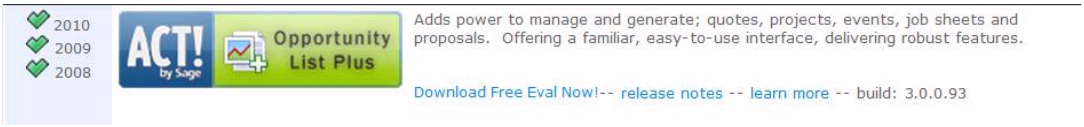
All hotfixes and patches are posted on our download page at http://www.durkincomputing.com/Download.aspx All minor incremental version-numbers are always free upgrades because these releases include fixes, and also minor product enhancements. All major product increments include major product enhancements and so are chargable upgrades.

What is a build number:

The process of compiling and packaging an application is sometimes referred to as "building". A version such as 2.0.0 (Build 8) will be compiled many times before it is released. In this case it's been built and tested 8 times. Each of these "builds" are numbered so developers can keep track of changes and problems. Think of it as versions of the released version.

Every release will have a unique build number displayed on the far right side of the product entry. In this example we can see that Durkin Opportunity List Plus for ACT! has a build number of 3.0.0 (Build 93)

3 - The major product number
0 - The minor product number
0 - Product modification number
93 - The incremental build number


2010
2009
2008
ACT! by Sage
Opportunity List Plus
Adds power to manage and generate; quotes, projects, events, job sheets and proposals. Offering a familiar, easy-to-use interface, delivering robust features.
Download Free Eval Now!-- release notes -- learn more -- build: 3.0.0.93

As products near their final release the product number will be incremented. In this case the final release of this product will become 3.0.0 (Build 100)

See also

System Requirements
Installing from Internet
Enter the Activation Key

Options

To change a settings go Tools > Durkin Calendar

or click the Options button on the toolbar

About Tab

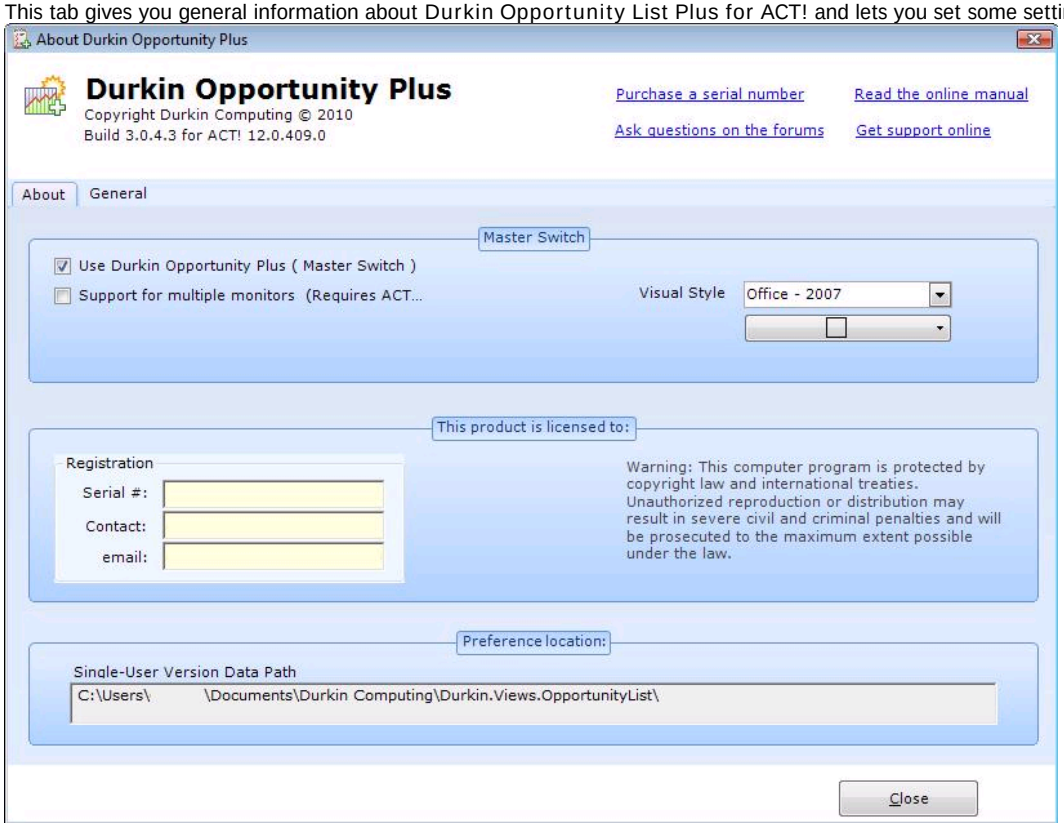
General Tab

See also

Help Home
PDF Version
Welcome
Installation
Toolbar
Queries
Right Click Menu
Color - Rules
Invoice Number Generation
Documents

About Tab

This tab gives you general information about Durkin Opportunity List Plus for ACT! and lets you set some settings.


About Durkin Opportunity Plus
Durkin Opportunity Plus
Copyright Durkin Computing © 2010
Build 3.0.4.3 for ACT! 12.0.409.0
Purchase a serial number
Read the online manual
Ask questions on the forums
Get support online
About
General
Master Switch
Use Durkin Opportunity Plus (Master Switch)
Support for multiple monitors (Requires ACT...
Visual Style
Office - 2007
This product is licensed to:
Registration
Serial #:
Contact:
email:
Warning: This computer program is protected by copyright law and international treaties. Unauthorized reproduction or distribution may result in severe civil and criminal penalties and will be prosecuted to the maximum extent possible under the law.
Preference location:
Single-User Version Data Path
C:\Users\ \Documents\Durkin Computing\Durkin.Views.OpportunityList\
Close

Use Durkin Opportunity Plus (Master Switch) shows Durkin Opportunity List Plus for ACT! when checked.

Support for multiple monitors (Requires ACT! restart) shows Durkin Opportunity List Plus for ACT! in it's own window separate from ACT! when checked.

Visual Style sets the fashion and color of Durkin Opportunity List Plus for ACT! . The selections are Standard 2003, Standard 2005, Office 2003 and Office 2007. If The Durkin Toolkit for ACT! is installed this setting is supesceded by the Toolkits setting and should be set there.

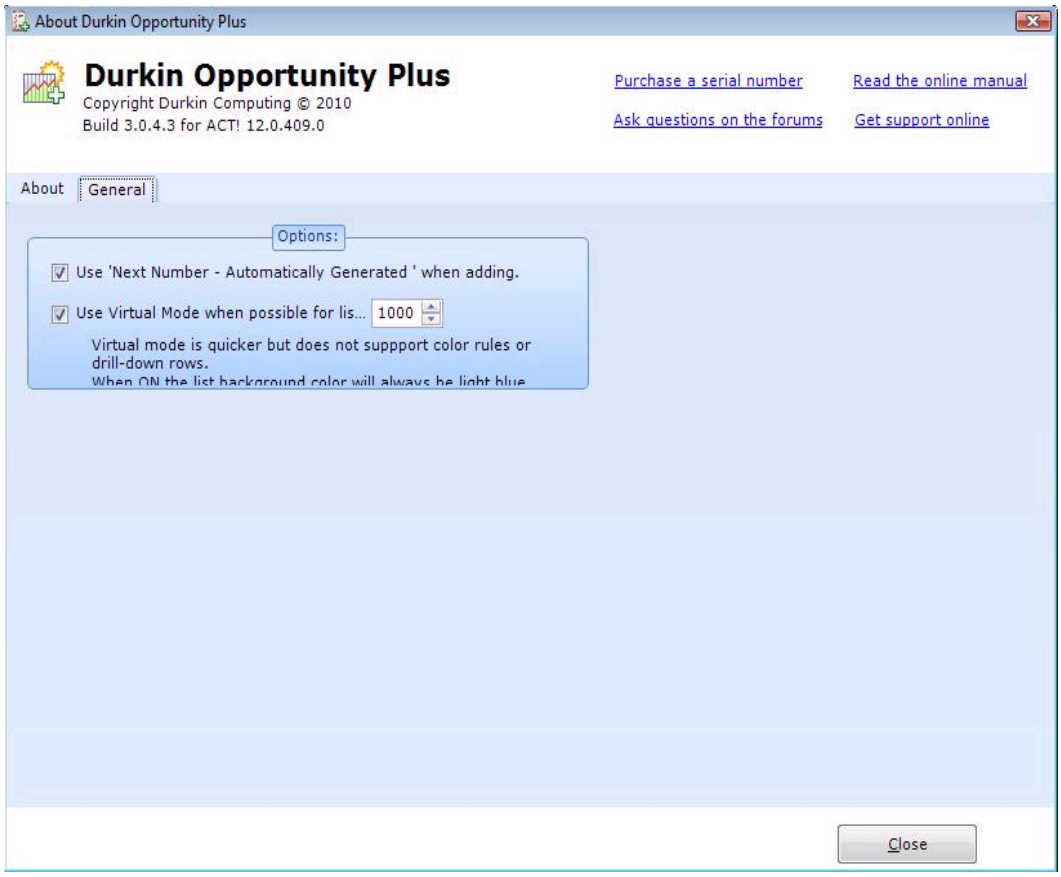
The number serial, registering name and email can be found, along with where preferences for Durkin Opportunity List Plus for ACT! are stored.

See also

General Tab

General Tab

General setting for Durkin Opportunity List Plus for ACT! .


About Durkin Opportunity Plus
Durkin Opportunity Plus
Copyright Durkin Computing © 2010
Build 3.0.4.3 for ACT! 12.0.409.0
Purchase a serial number
Read the online manual
Ask questions on the forums
Get support online
About
General
Options:
Use 'Next Number - Automatically Generated ' when adding.
Use Virtual Mode when possible for lis...
1000
Virtual mode is quicker but does not suppport color rules or drill-down rows.
When ON the list background color will always be light blue
Close

When checked, Use 'Next Number - Automatically Generated'... checkbox will bring forward a window to allow opportunities to be numbered.

When checked, Use Virtual Mode... the grid will show only what is visible to the user, this will speed up Durkin Opportunity List Plus for ACT! . Turning on this feature will set the background color to light blue.

See also

About Tab

Toolbar

The different buttons on the toolbar and their uses.

New will create a new opportunity.

Edit will open up the selected opportunity to change.

Update lets you change the status and actual close date of the opportunity.

Delete will delete the selected opportunity.

Color will open up the Color Rules window. To see more on color rules go to the Color Rules section.

Documents will let you select a template to create a document from based on information in the activity. To see more on documents go to the Documents section.

Queries will show opportunities that match specific conditions. To see more on queries go to Queries section.

In the Queries drop down:

Show/Hide Query will hide the query builder if shown or show if hidden.

Save Query will save the current query.

Filter Row will show the filter row if hidden or hide it if is shown.

Manage Queries brings up a window to manage the queries.

Clear Query will reset the query to start over again.

Columns will bring up a window to add or remove columns from the opportunity view. Primary columns are columns for the opportunity. Drill-down Columns are to add columns for the opportunity products if shown.

In the Columns drop down:

New Column Set will create a new column set.

Save Column Set will save the current column set.

Customize Columns is the same as clicking on the Columns button in the toolbar.

Manage Column Sets opens up a window that lets you create, remove and select column sets.

Sort brings up a window that allows you to sort opportunities on up to four different fields.

Group By brings up a window that allows you to group opportunities on up to four different fields

The Plus Minus buttons will expand or collapse the group sections.

Options will bring up the Options window. To see more go to Options section.

Refresh will refresh the opportunity view.

Excel will export the activities shown currently in the view to Microsoft Excel, (Microsoft Excel required).

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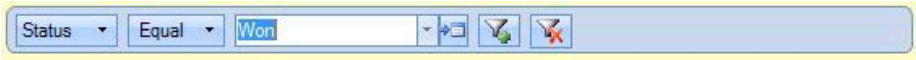
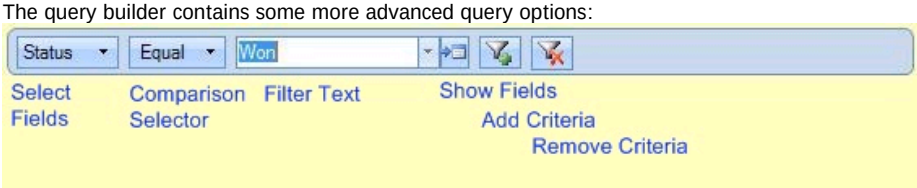
Queries

The Query builder allows you to design a single or a multi-column (advanced) query. A query is a method of filtering the list. Once you have designed a query, the list will be filtered on those conditions.

To create a new query:
1) Select the desired field to query
2) Select the comparison e.g. "Equal"
3) Enter a value e.g. "Won" then click "ENTER" on your keyboard
4) This will show all opportunities with a status of won.



The query builder contains some more advanced query options:



1. Select Fields - Use this drop-down to select the ACT! field to filter on Status.

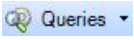
2. Comparison Selector - Use this drop-down to select the comparison operator e.g. "Contains", "Starts With", or "Equal"

3. Enter Filter Text - Use this drop-down to enter the filter text e.g. "Won"

4. Show Fields - This option uses values in a second field to be compared to the first.
Rather than using the value from 3. Enter Filter Text, this 0ption will use the value from a second field. "Does FieldA contain value from FieldB?"

6. Add Criteria - Use this option to add additional criteria line(s). "Show me all opportunites where the status contains 'Won' and the Gross Margin is greater than '20'.

7. Remove Criteria - Use this option to remove additional criteria.

1. Click on the QUERIES button on the toolbar. 

2. Click on the CLICK HERE TO ADD FILTER CRITERIA button
3. Select Status from the fields drop-down.
4. Select Equal from the comparison drop-down.
5. Enter the value of 'Won' in the text box then click RETURN

If you would like to add additional conditions:
6. Click on the ADD CRITERIA button
7. Select Gross margin from the fields drop-down.
8. Select Greater Than from the comparison drop-down.
9. Enter the value of '20' in the text box then click RETURN

This query will return all rows where status contains won and the gross margin is greater than 20.

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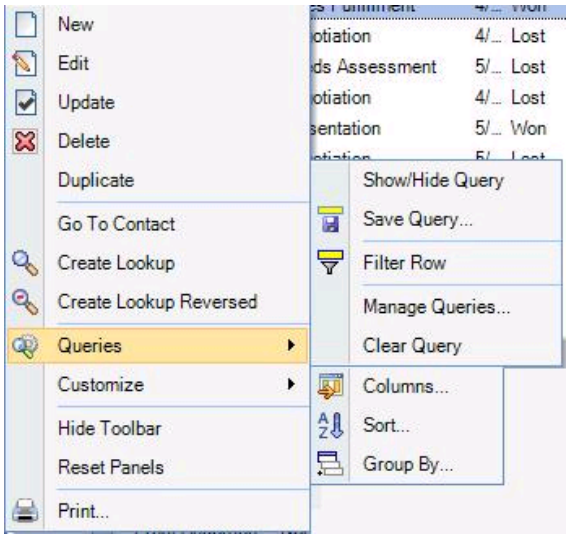
Right Click Menu

The right click menu of Durkin Opportunity List Plus for ACT! .

Right clicking on the opportunity list.



New will create a new opportunity.

Edit will allow the opportunity to be changed.

Update lets you change the status and actual close date of the opportunity.

Delete will remove the opportunity.

Duplicate will make a copy of the opportunity.

Go to Contact will bring up a list of the contact(s) in the Schedule With field.

Create Lookup will bring up a list of the contact(s) in the Schedule With field.

Create Lookup Reversed will bring up a list oontact(s) that are not in the Schedule With field.

Queries allows you to show or hide the query and filter row, save, manage or clear a query.

Customize allows you to change the columns displayed, how the columns are sorted or grouped.

Hide Toolbar will hide the toolbar for Durkin Opportunity List Plus for ACT! .

Reset Panels will reset all the Durkin Opportunity List Plus for ACT! panels back to the default settings.

Print Opportunity List will bring up the print window.

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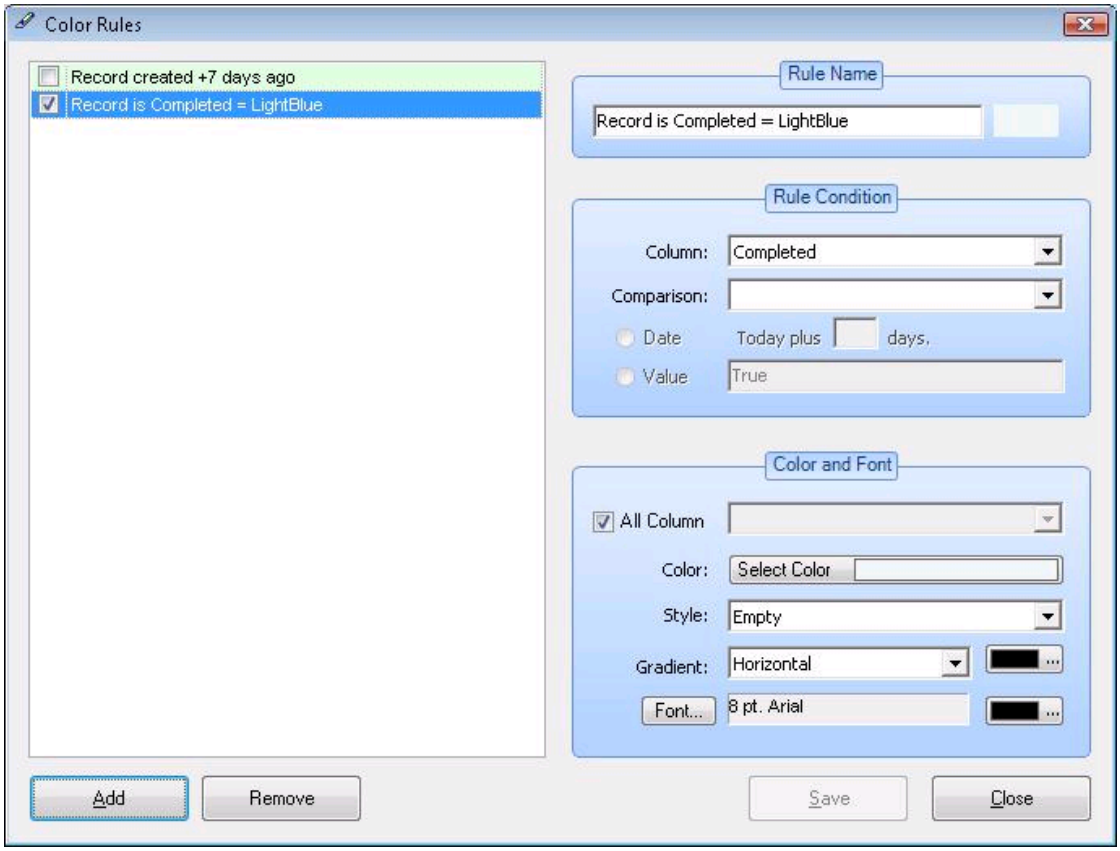
Color - Rules

Color rules are designed to colorize records for rows that match a condition. Color rules can be based on text condition like the one below. In this color rule we are making all rows blue where the word "Triumph" apears in the MAKE column.



Lets try a simple color rule like: "Make all the files that the Department = Sales highlighted in green"

1. First open the Color Rules window by selecting the Color Rules menu in Settings.
2. Click on the Add button at the bottom of the rules window.
3. Enter the Rule Name at the top of the window. Lets enter Department = Sales
4. Change the column to Department
5. Change the Comparison popup to Contains.
6. Change the Date/Value(s)/Custom radio selector to Values(s)
7. Enter the value of Salesinto the Value 1 field.
8. Click on the Font & Color tab.
9. Click on the color button near the bottom of the window and select the color green from the color picker window. After you have closed the color picker window the color button will display the selected color.
8. Click on Save.

Now all you have to do is to close the rules window and click on the F5 key to refresh in the list.

Color Rules colorize all tasks in the list. Color rules can apply to multiple tasks like all 'Meeting' or to singular tasks like 'Details field = "Bring Projector"

Color rules are designed to colorize rows or columns from your activities that match any number of conditions. Immediately, we see three keywords: we need to COLORIZE tasks FROM the list that matches a CONDITION. Hence we have the most basic Color Rule structure:

COLORIZE "ColumnName" FROM the TaskList Where x=ColumnValue"

The COLORIZE keyword allows us to color one column or all columns such as Task Type, Regarding, Date, or location. These columns are all available to you when you select Customize Columns.

COLOR *Columns* FROM the Task List Where x=ColumnValue"

Lastly, we want the color conditions. This is the 'Where' part of the select statement above.

For example, we may want to display the color Red where the type of activities are high priority. To do this, we use the Color Rules builder to create the condition. The rule is built for you by selecting just three simple conditions.

1. The column to apply the rule to
2. The comparison operator
3. The value to compare.
4. The color to highlight

In the example of activities where priority is equal to 'High' would read like this.

1. Column = TaskType
2. Comparison = Equal
3. Clause = High
4. Color = Red

In a sentence this would read. Display all files with Red where the TaskType column contains a values of "High".

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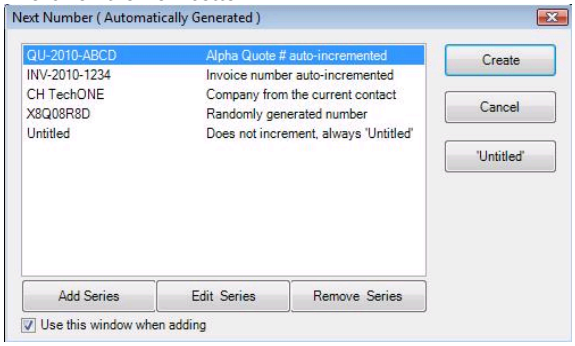
Invoice Number Generation

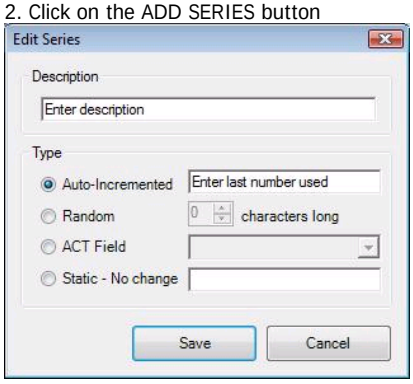
This feature allows you may use one of several predetermined number sequences.

To create a auto-numbering series follow these steps:

1. Click on the New botton



2. Click on the ADD SERIES button



3. Enter the series descition and the last number used like: INV-0345

4. Click on the SAVE button.

Auto-incremented will take the previous number or letter and increment it by one
Random will create a random string of letters and numbers the desired length
Act Field will create the opportunity name from the selected contact field
Static - no change will always use this as the opportunity name

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Documents

How to create, save and send documents.

Edit Document

Create Document

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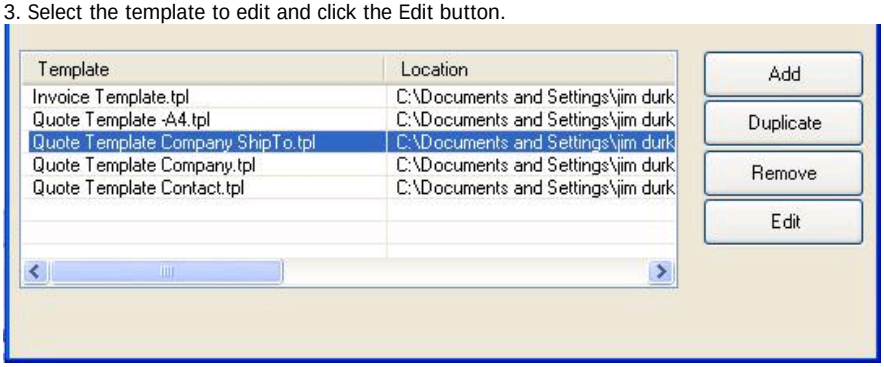
Edit Document

To create a document

1. Click the Document button in the toolbar.

2. Click the Templates button to show the editing part of the window

3. Select the template to edit and click the Edit button.



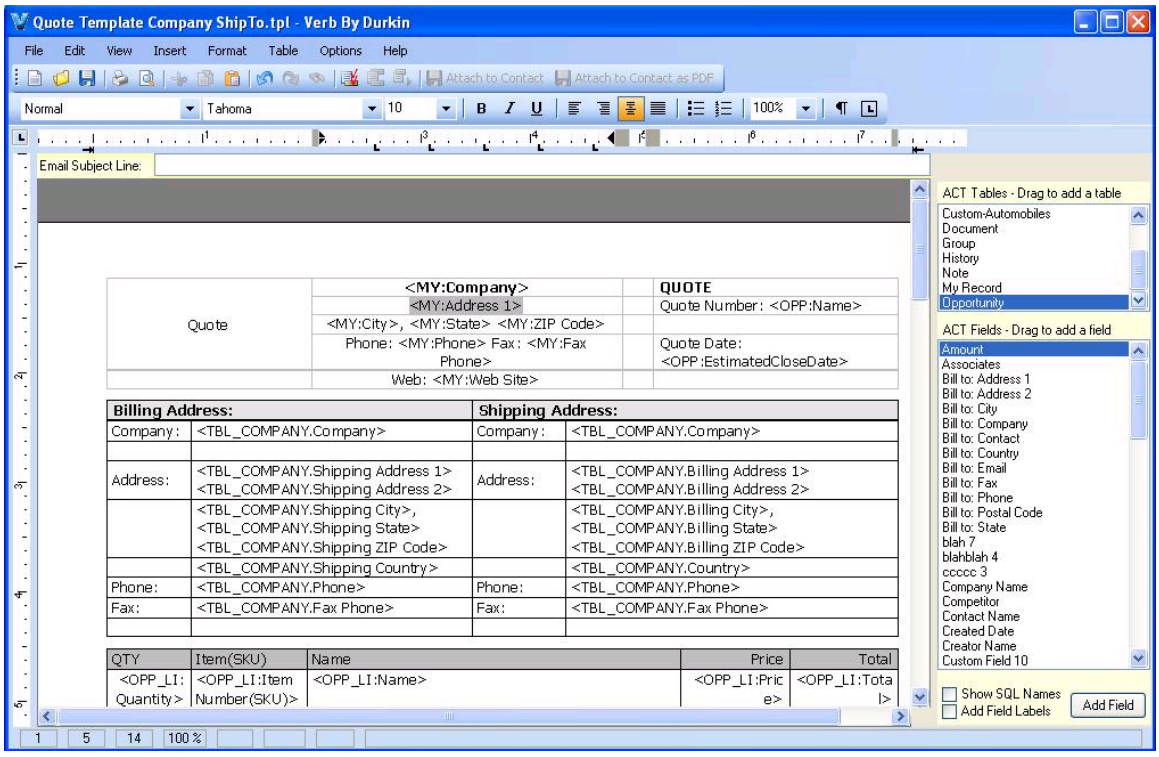
4. Depending on the Act preference of default word processor you will continue with one of the following pages.
The Word Template if Microsoft 2002 (XP), 2003, or 2007 is the preference or Durkin Template if Act Word Process is choosen.

Word Template Durkin Template

See also

Create Document

Word Template



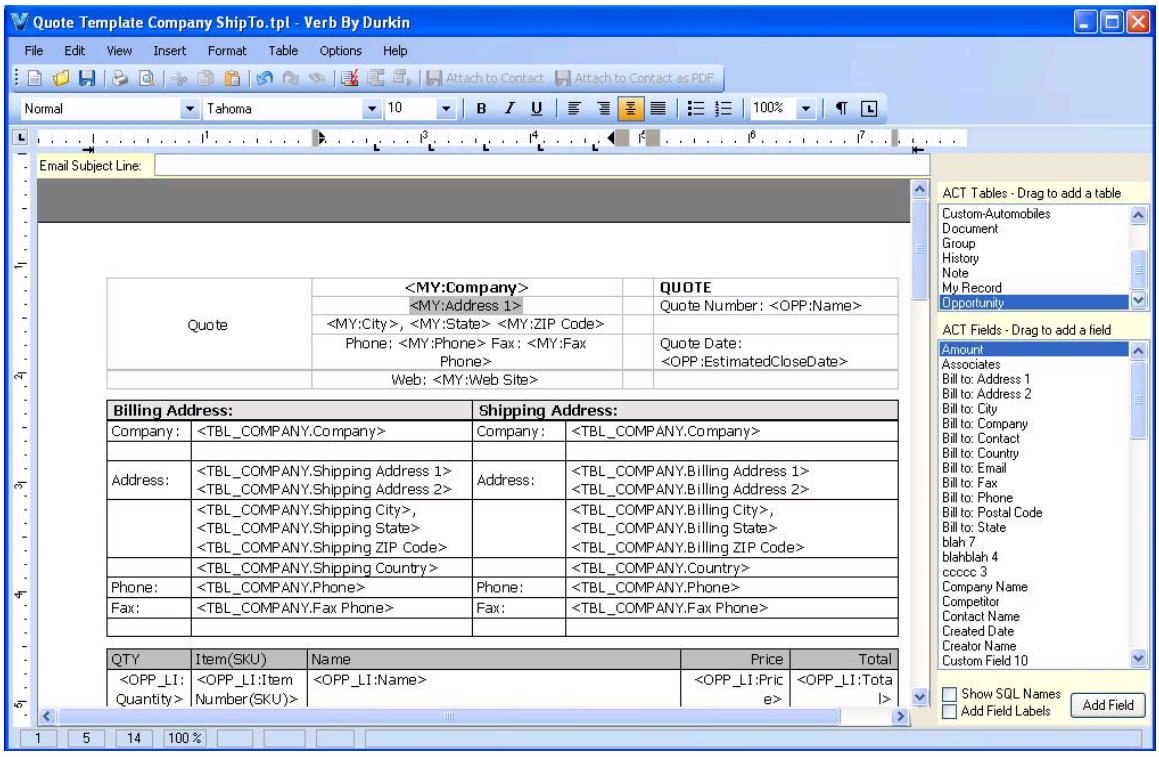
To add a field put the cursor in the template place where you want to add a the field, choose the table from the Act Tables Table, select the field you want to add and click the add field button.

To delete a field double click the field and in the window that pops up click the delete button.

See also

Durkin Template

Durkin Template



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To delete a field double click the field and in the window that pops up click the delete button.

See also

Word Template

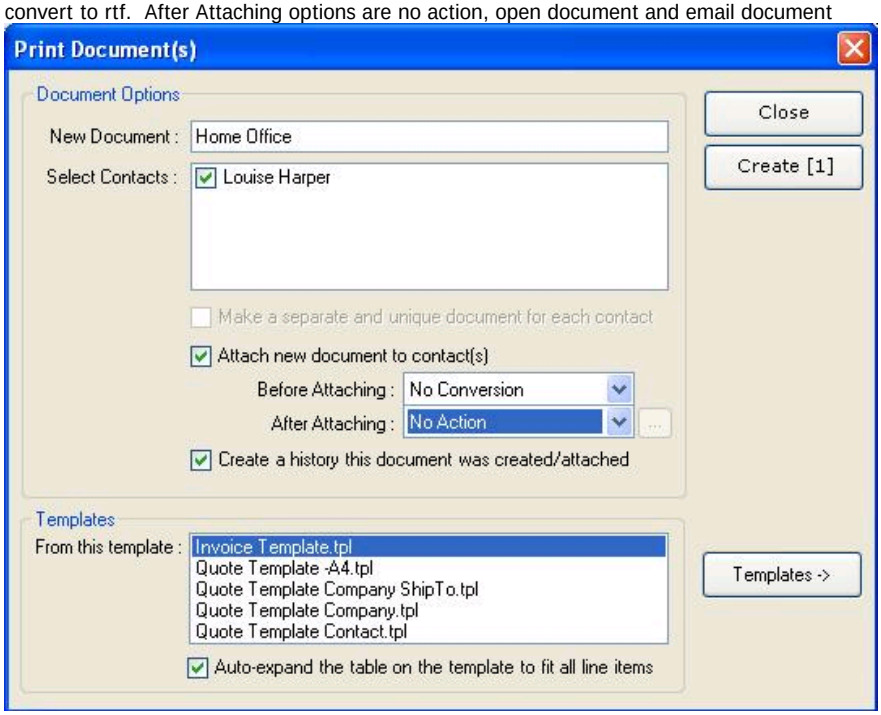
Create Document

To create a document

1. Select the opportunity you want to create a document for

2. Click the Document button in the toolbar

3. Name the Document, choose the Contacts to create the document for, choose what to do before and after attaching the document and choose the template to use. Before Attaching options are no conversion, convert to pdf, convert to doc and convert to rtf. After Attaching options are no action, open document and email document



4. Click the create button to make the document

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Edit Document

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DurkinOpportunity